Oracle Life Sciences Consolidated Intake

User Guide

Release 2026.1.01
G50278-01
March 2026

Oracle Life Sciences Consolidated Intake User Guide, Release 2026.1.01

G50278-01

Contents

6 Working with the Intake Worklist

7 Working with your records

8 Using the On Hold Worklist

9 Monitoring your records

1
About Consolidated Intake

Consolidated Intake is an advanced pharmacovigilance system that optimizes the handling of Adverse Event (AE) documents in a unified user interface. It is included as part of your Oracle Safety One Argus subscription.

Consolidated Intake provides multiple options for ingesting AE documents, including manual uploads, automatic uploads via API, email, or Electronic Data Interchange (EDI).

Consolidated Intake processes AE documents into cases, in a sequential workflow. The workflow is as follows:

1. Via email, API, Electronic Data Interchange or through direct user upload, documents are ingested by Consolidated Intake.
2. As part of this step, Consolidated Intake marks records that require manual review - this may involve reviewing and confirming extracted information, correcting validation errors, or providing any missing data.
3. Consolidated Intake classifies the E2B document. If you have the Oracle Safety One Intake add-on, the document is classified according to your extraction configuration.
4. To extract adverse event data from the document, Oracle Safety One Intake uses advanced AI (Artificial Intelligence) and ML (Machine Learning) techniques that can extract relevant attributes from structured (like the CIOMS form) and unstructured (like an email) source files. As part of this step, Oracle Safety One Intake marks records that require manual review, which can involve reviewing and confirming extracted information, correcting validation errors, or providing any missing data. For unidentified documents, the option to perform manual data entry is available.

   > **Note**
   >
   > This piece of the workflow requires an additional subscription to Oracle Safety One Intake. This can be added to your Oracle Safety One Argus suite to harness the power of AI during AE extraction of structured and unstructured documents.

   > **Caution**
   >
   > AI-powered automatic extraction from source documents is for evaluation purposes only. Please review the output thoroughly before use.

5. For E2Bs, the system checks the document against other, already ingested documents, marking it for Duplicate Search or Merge Follow-up. Users manually compare the data of records with these statuses, then either accept or reject them.
   - If the source is configured for auto-acceptance, the system creates a new case from the E2B or merges it as a follow-up without the need for additional manual intervention.
6. If the target system is configured to accept data automatically, the data will be converted into a new case or will be merged with an existing one.

2 Set up Consolidated Intake

To begin working in Consolidated Intake, there are several steps you must take.

- Prerequisites
  To start working, you must first receive your Oracle Identity Cloud Service (IDCS) account as well as the product URL from your organization's delegated administrator.
- Accounts and roles
  From your delegated administrator, you must obtain all the roles necessary for working in the Oracle Argus Safety Console.
- Username and password
  You will receive your username and password via email once your delegated administrator creates your account in Oracle IDCS.
- Product URL
  Your delegated administrator is responsible for sharing the product URL with all Consolidated Intake users at your organization.
- Scale and layout
  To properly view and use Consolidated Intake, your computer must first fulfill several requirements.

Prerequisites

To start working, you must first receive your Oracle Identity Cloud Service (IDCS) account as well as the product URL from your organization's delegated administrator.

Accounts and roles

From your delegated administrator, you must obtain all the roles necessary for working in the Oracle Argus Safety Console.

If you are responsible for user role management or would like to find out more about roles and permissions in the Oracle Argus Safety Console, see Add users and assign roles, in the Consolidated Intake Administration Guide.

Username and password

You will receive your username and password via email once your delegated administrator creates your account in Oracle IDCS.

Product URL

Your delegated administrator is responsible for sharing the product URL with all Consolidated Intake users at your organization.

Bookmark the URL you receive from your delegated administrator, not the URL that appears in your browser once you access the application.

> **Tip**
>
> If you cannot bookmark a typed URL in your browser, you can bookmark the URL that appears after you access the application, then edit the bookmark, and add the URL you received from your delegated administrator.

Scale and layout

To properly view and use Consolidated Intake, your computer must first fulfill several requirements.

The supported screen scale (zoom) is 100%. If the scale is not set to 100%, this may distort or truncate the user interface.

The recommended screen resolution is 1440 x 900 and above. Depending on the device you are using to display Oracle Safety One Argus, the supported layout may vary.

> **Note**
>
> For Consolidated Intake to work optimally, disable the pop-up blocker in your browser's settings. You should also access Consolidated Intake in a single tab or window.

3

Get started with Consolidated Intake

Consolidated Intake lets you to manage and process all incoming Adverse Event reports in one place. With an additional subscription to Oracle Safety One Intake, it can automatically extract adverse event attributes from structured and unstructured form text.

- Log in
  Includes step-by-step guidance on how to safely log into Consolidated Intake.
- Log out
- Know your role
  When working with AE documents in Consolidated Intake, you can have either an intake processor role or a workflow manager role.
- Navigating
  Once you have logged in, you will be redirected to the Intake Worklist page, which also serves as the home page.
- Switch between enterprises as a CRO
  Consolidated Intake offers the capability for CRO (Contract Research Organization) users to work across several enterprises, all at once.

Log in

Includes step-by-step guidance on how to safely log into Consolidated Intake.

To log in to Consolidated Intake, follow the steps below.

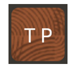
1. In your browser's address bar, enter the URL for Consolidated Intake.
2. When the login screen appears, enter your username and password.
3. Click **Login**.
4. Alternately, you may access Consolidated Intake from the Oracle Safety One Argus interface by clicking the **Consolidated Intake** button.

After logging in, you are taken to the Intake Worklist, which is the home page. From there, you can choose to navigate to different pages as needed. To do so, select the **Navigation Menu** on the top left corner of the screen, and select either **Intake Worklist** or **Intake Monitor**.

The version number and Consolidated Intake environment can be seen from any page by selecting the **User menu** TP from the top right corner of the page, then selecting **About Argus**.

To access the Oracle Safety One Argus documentation, select the **User menu** TP from the top right corner of the screen and then click **Help.**

Log out

To log out, select the **User menu**  in the top right corner and then select **Logout**.

Know your role

When working with AE documents in Consolidated Intake, you can have either an intake processor role or a workflow manager role.

For a complete list of roles involved in the processes of Consolidated Intake, see User role attributes.

- Intake processor
  As an intake processor, your responsibilities include handling the intake records uploaded to Oracle Safety One Intake.
- Workflow manager
  If you have the workflow manager role assigned, your primary responsibility revolves around ensuring accurate assignment and timely processing of incoming records within the established service-level agreement.

Intake processor

As an intake processor, your responsibilities include handling the intake records uploaded to Oracle Safety One Intake.

Optionally, you may be associated with a user group. Based on your permissions, you can access ingested AE documents affiliated with your site, those assigned specifically to you, and those assigned to other members within your user group.

Workflow manager

If you have the workflow manager role assigned, your primary responsibility revolves around ensuring accurate assignment and timely processing of incoming records within the established service-level agreement.

As an authorized user, you can assign records to the appropriate users to help prevent delays in processing. You can also access all AE documents that have been ingested and are associated with your site.

Navigating

Once you have logged in, you will be redirected to the Intake Worklist page, which also serves as the home page.

Depending on your requirements, you can select the **Navigation Menu** , located on the top-left corner of the page, and choose one of the following options:

- **Intake Worklist**
- **Intake Monitor**
- **On Hold Worklist**

> **Tip**
>
> You can also return to the Intake Worklist from any page by clicking **Navigation Menu** , in the top-right corner.

To access information on the Consolidated Intake version number and the name of the Consolidated Intake environment you are currently using, select the **User menu** TP in the top-right corner and select **About**.

For quick access to relevant documents and training materials, select the **User menu** TP in the top-right corner and select **Help**.

You can also access a detailed view of each intake record by clicking one of the hyperlinked IDs from the list of records.

Switch between enterprises as a CRO

Consolidated Intake offers the capability for CRO (Contract Research Organization) users to work across several enterprises, all at once.

Each enterprise can be configured separately, with its own set of permissions for users, user groups, and intake records, as well as AE document interpretation method.

As a workflow manager, you can switch between enterprises and work as you would normally, without losing progress on either enterprise you have access to. Each enterprise has its own set of associated records and configurations. Administrators can also set up new enterprises or copy enterprise configurations.

Whenever you switch between enterprises, what you see in the Intake Worklist and the Intake Monitor changes.

The enterprises are listed alphabetically. Should you have access to more than 10 enterprises, an enterprise browser with search capabilities is available.

> **Note**
>
> Preferences such as applied filters, your search history, filter suggestions, or your column settings are saved for each of the enterprises you have access to.

1. On the upper right-hand side of the page, select the **Navigation menu** .
2. Select **Switch Enterprise**, then select the enterprise environment you would like to change to.

   > **Note**
   >
   > This menu item will not be available unless you have access to at least two enterprises.

4

Uploading documents

Consolidated Intake can ingest Adverse Event (AE) documents automatically, but depending on your role, you may also be able to upload AE documents manually.

- Understanding which documents to add
  The Consolidated Intake system can be configured to automatically process a range of AE document types.
- Upload documents automatically
  Consolidated Intake can ingest documents automatically via email, Electronic Data Interchange (EDI), and APIs.
- Upload documents manually
  One way of processing AE documents in Consolidated Intake is through manual upload, using the user interface. This feature may be useful to you if the file you are working with is an E2B or document that can be automatically extracted using the additional Oracle Safety One Intake subscription.
- Create a record using Manual Intake
  When you create a new record using the **Manual Intake** option from the **More Actions** menu on the Intake Worklist, you can begin the intake workflow for the record without a source document. The process begins with you performing a search of existing records.

Understanding which documents to add

The Consolidated Intake system can be configured to automatically process a range of AE document types.

Supported AE document types

Consolidated Intake can normally ingest the following types of AE documents:

- AE reports in the form of email, spontaneous AE forms, or call center AEs.
- Company websites, company adverse event reporting portals, voice to text transcriptions, chatbot text.
- Clinical Serious Adverse Events (SAEe), in the form of papers, fax, or a digital format.
- Literature cases and Medical Literature Monitoring ICSRs.
- E2B(R2) and E2B(R3) files.

To find out which document types are supported for your organization, contact your delegated administrator.

Supported file types

By default, Consolidated Intake supports the following file types:

Table 4-1 Safety One Intake supported file types for ingestion

File type	Format
Image	VSD, TIF, TIFF, PSD, PS, PNG, JPG, JPEG, BMP, GIF
Text	DOC, DOCX, TXT, RTF, PDF, MSG, WPD
Spreadsheet	XLS, XLSX, CSV
Other	MDB, ZIP, DICOM, DCM, PPT
Markup	XML, SGML, SGM

> **Note**
>
> Your delegated administrator configures the file types you can upload to Consolidated Intake.

Supported file types for automated processing

Automatic extraction only works for the following:

- E2B R2 and R3 files.
- Text and image-based files, such as faxes or scanned documents. These can only be in DOC, DOCX, and PDF formats.

  > **Note**
  >
  > DOC, DOCX, and PDF extractions require an additional subscription to Oracle Safety One Intake. For more information, reach out to your Oracle point of contact.

- Extraction for DOC, DOCX, and PDF files requires recipe configuration. For more information, see Create a new recipe configuration.

Upload documents automatically

Consolidated Intake can ingest documents automatically via email, Electronic Data Interchange (EDI), and APIs.

Consolidated Intake supports integration with email clients. This is set up by your administrator. With this integration, emails and their attachments can be ingested in the Oracle Safety One Argus system.

By means of EDI, Consolidated Intake can ingest E2B adverse event reports.

Consolidated Intake also supports integration with third party systems and applications through REST APIs, through which AE documents can be ingested automatically. For more information, see REST API for Safety One Intake.

The following are a few of the sources of data which can normally be used to ingest data via API:

- Social media
- Document management systems

- Product complaint systems
- Sales consultants
- Medical Information (MI) systems
- Clinical Trial Post-Authorization Safety Study (PASS)
- Affiliate Patient Supports Programs (PSP)

Upload documents manually

One way of processing AE documents in Consolidated Intake is through manual upload, using the user interface. This feature may be useful to you if the file you are working with is an E2B or document that can be automatically extracted using the additional Oracle Safety One Intake subscription.

If you need to process the content of your AE document manually, we recommend using the Manual Intake feature. For more information, see Create a record using Manual Intake in this user guide.

1. In the upper-right corner of the Intake Worklist, select **More Actions** ··· and then select **Upload Document**.
2. Follow the on-screen instructions to continue uploading the document.

   > **Tip**
   >
   > You can also drag and drop one or several documents to the browser tab where you have Consolidated Intake open.

3. Select the **Site** dropdown, then select the site you would like to ingest the document for.
4. Select **Process Reports**.

   > **Note**
   >
   > Processing your reports can take up to several minutes to complete.

Create a record using Manual Intake

When you create a new record using the **Manual Intake** option from the **More Actions** menu on the Intake Worklist, you can begin the intake workflow for the record without a source document. The process begins with you performing a search of existing records.

> **Note**
>
> If a document has already been uploaded and the record as marked with the **Manual Intake** task in the Intake Worklist, you must add the missing data to continue the intake process. Refer to Add missing data in this guide for more information.

To begin creating a record manually without extracting information from a source document, do the following:

1. Select **Manual Intake** from the ••• **More Actions** menu.
2. You are taken to the Search Criteria interface where you can enter parameters to search existing records.
3. After reviewing the results, you can do any of the following:
   - Select an existing record and click **Merge Follow-up**. You are taken to the Merge Follow-up interface where you can review and compare the information you entered in the search fields with the existing record. From there, you can select **Merge** to complete the follow-up merge flow.
   - Use **Confirm Initial** to create a new record. You will need to provide a justification for case acceptance. The new record will carry over relevant search criteria you entered into the Intake Form. You must manually complete all required information in the Intake Form before clicking **Create Case**.
   - Select **Export Results List** from the **Actions** menu to download a file containing the results of your search.
   - Click **Search** to perform another duplicate search.

5

Managing assignments

Depending on your role, you may be able to assign and unassign records. You can also take advantage of the automatic assignment function. Read more about record assignment in the topics below.

- Manage assignments as a workflow manager
  As a workflow manager, you are authorized to manage assignees for intake records. In the Intake Worklist, you can assign records to individuals or user groups.
- Manage assignments as an intake processor
  As an intake processor, you can assign a record to yourself or unassign a record that has been assigned to you.
- Possible errors in assignment and what you should do
  You may receive an error as you assign or unassign records. See the table below for detailed explanations of the errors you may receive, as well as the actions you should take to fix them.
- Automatic record assignment
  To facilitate the smooth running of the intake process, records requiring manual intervention can be assigned automatically to intake processors, upon request. This is for them to easily see what they need to work on next, either at the start of their day or when their current task is complete.

Manage assignments as a workflow manager

As a workflow manager, you are authorized to manage assignees for intake records. In the Intake Worklist, you can assign records to individuals or user groups.

You can assign a record to an individual or group in three distinct ways:

- Using the **Assign** hyperlink, as you upload documents to Consolidated Intake.
- Using the **Actions** menu, from the Intake Worklist. Using this method, you can manage the assignees of your records in bulk.
- Using the **Expand Details** button for each individual record.

You can have either a single user or a single user group assigned to a record.

1. Depending on your requirements, perform one of the following:
   - Once a document has been uploaded, select the **Assign** hyperlink.
   - In the Intake Worklist, check the boxes of one or several records, on the left, then select the **Actions** button on the upper right, and choose **Assign**.
   - Select a record, then select **Expand Details** at the top of the records frame, then choose **Assignment**.

   All three options open a panel where you can assign a record by selecting from a list of groups and users.
2. In the panel, you can select which groups or users to assign the record to.

Tip

Use the search bar to narrow down the number of assignees.

3. Once you have made your selection, select **Confirm Assignment**.
4. Check that your selection is reflected in the **Assigned To** column in the Intake Worklist.

Note

Keep an eye out for notifications, at the bottom of the page. If you receive an error message, select **View Errors** to see why it occurred. For more information on the errors you may receive, see Possible errors in assignment and what you should do.

Manage assignments as an intake processor

As an intake processor, you can assign a record to yourself or unassign a record that has been assigned to you.

To assign or unassign records, follow the steps below.

1. In the Intake Worklist, select one or more records by checking their boxes on the left.
2. Select the **Actions** button, then select one of the following:
   - **Assign to me**
   - **Unassign**

   You are only allowed to unassign the records that are assigned to you.

Note

Keep an eye out for notifications, on the bottom of the page. If you receive an error message, select **View Errors** to find out why this has happened. For more information on the errors you may receive, see Possible errors in assignment and what you should do.

Possible errors in assignment and what you should do

You may receive an error as you assign or unassign records. See the table below for detailed explanations of the errors you may receive, as well as the actions you should take to fix them.

Table 5-1 Possible assignment errors and how to fix them

Error	Why has this happened?	Actions to take
Intake Complete	The record no longer needs manual intervention.	Refresh the Intake Worklist. This may clear the record from your roster.
Read Only	A different user is currently working on the record.	Retry your action periodically until the record is no longer busy.

Table 5-1 (Cont.) Possible assignment errors and how to fix them

Error	Why has this happened?	Actions to take
Restricted Access to Site	The selected user does not have access to the record due to a site restriction.	Reach out to your delegated administrator.
Task Status Changed	The system has begun processing the record and manual intervention is no longer required. The record could have also been assigned to a different user or could have been assigned to a user group you currently do not have access to.	Refresh the Intake Worklist. This may clear the record from your roster.

Automatic record assignment

To facilitate the smooth running of the intake process, records requiring manual intervention can be assigned automatically to intake processors, upon request. This is for them to easily see what they need to work on next, either at the start of their day or when their current task is complete.

Intake processors can open the top priority record from the records already assigned to them; if no record is assigned, they can request one by clicking the **Open Next Record** in the top right corner of the Intake Worklist.

> **Note**
>
> The **Open Next Record** button is only displayed if auto-assignment is enabled in configuration.

Intake processors can also begin working on a record in the Intake Worklist or Intake Monitor. Once they have finished working on their record, the system automatically prompts them to begin working on the next available record or return to either the Intake Worklist or the Intake Monitor, depending on where they have originally begun working on the record .

While it is typically the responsibility of workflow managers to assign records to users or groups of users, they no longer have to triage and assign intake records individually or through a third-party tool, providing a significant increase in workflow efficiency and processing turnaround.

> **Note**
>
> Workflow managers can still manually assign records. For more information, see Manage assignments as a workflow manager.

When it comes to automatic record assignment, the system prioritizes the records that are already assigned to a user. If the user has no records assigned, the system checks for records assigned to the group the user is part of. If the user group have no assigned records, the system automatically selects an unassigned record from the Intake Worklist using the following criteria:

- Seriousness: the primary criterion used by the Consolidated Intake system.
- Intake date: the secondary criterion used by the Consolidated Intake system, ensuring that the record with the earliest intake date is assigned first. This ensures that the SLA is adhered to.

Workflow managers and intake processors can also opt to assign intake records to themselves. As a workflow manager, you can select **Actions** on in the Intake Worklist, then select **Open Next Record**. As an intake processor, you can select **Open Next Record** from the top right corner of the Intake Worklist.

Whenever users select **Open Next Record** and there are no records requiring user intervention, the system notifies them of this.

If a record is unassigned by an intake processor, the system will not re-assign the record to the same intake processor. Instead, the record will be assigned to a different intake processor.

6

Working with the Intake Worklist

Learn more about processing incoming records in the topics below.

- Get familiar with the Intake Worklist
  The Intake Worklist is a central list within the Consolidated Intake system which contains all the records that require manual intervention.
- Simplify worklist management using views
  For a better overview of your tasks, you can switch between views of the Intake Worklist.
- Optimize the data being displayed using columns
  By default, the Intake Worklist displays a predetermined set of columns. This can easily be personalized to match your needs.
- Fine-tune your worklist with advanced filters
  You can search for specific sets of records by applying filters on any columns from the Intake Worklist. You can use one or several of the quick filter suggestions or you can easily create your own.
- Refresh the Intake Worklist
  The Intake Worklist refreshes automatically after most of the significant actions you take. Nonetheless, you have the option of refreshing the Intake Worklist manually.

Get familiar with the Intake Worklist

The Intake Worklist is a central list within the Consolidated Intake system which contains all the records that require manual intervention.

The Intake Worklist can contain records from both manual and automatic uploads. For more information on uploading records to Oracle Safety One Intake, see Uploading documents.

To identify the source of a record, see the **Source** column. This column can have the following values:

- *Manual*: this indicates that a user has uploaded the record using the **Manual Intake** or **Upload Document** option in the **More Actions** menu.
- API source names, as configured by your administrator.
- Email source names, as configured by your administrator.
- EDI agency name, as configured by your administrator.

For efficient allocation, each record from the Intake Worklist is associated with a specific manual task you need to complete as an intake processor.

The records you can see in the Intake Worklist depend on your permissions:

- As a workflow manager, what you see in the Intake Worklist depends on site security.
- As an intake processor, what you see in the Intake Worklist depends on site and user group security.

You can access task-specific information without leaving the Intake Worklist by selecting **Expand Details** for individual records.

Simplify worklist management using views

For a better overview of your tasks, you can switch between views of the Intake Worklist.

The options visible to you may change depending on your role:

Table 6-1 List of Intake Worklist views

Views	Applicable User Role	Description
All	Workflow Manager	Lists all the intake records, regardless of the assignment. As a workflow manager, this will be your default view when you log in for the first time.
Assigned to Group	Workflow Manager, Intake Processor	Lists the intake records that are: • assigned to you • assigned to your user group • assigned to fellow members of your user group • unassigned
Assigned to Me	Workflow Manager, Intake Processor	Lists the intake records that are assigned to you. As an intake processor, this will be your default view when you log in for the first time.

1. Once you have logged in, select the **Views** drop-down in the top left corner.
2. From the drop-down menu, select your desired view.

> **Note**
>
> The view you have selected does not change if you log out of Consolidated Intake. You still have the same view when you log back in.

3. Sort your view according to your preferences. You can sort the records based on columns, either ascending or descending, by selecting **Sort Ascending** . By default, the records are sorted based on their date of intake, in ascending order.

Optimize the data being displayed using columns

By default, the Intake Worklist displays a predetermined set of columns. This can easily be personalized to match your needs.

1. On the right side of the page, select the **Columns menu** .
2. In the Columns window, ensure the appropriate columns are visible by checking the right side of the Select Columns panel. Columns with a pin icon are fixed and cannot be removed.

3. Select any additional columns you would like to add from the Available section, on the Select Columns panel.
4. Select **Apply** once you are happy with your selection of columns. Your choice of columns and arrangement are saved for future logins.
5. In the Intake Worklist, rearrange your columns by dragging and dropping them along the header.

Fine-tune your worklist with advanced filters

You can search for specific sets of records by applying filters on any columns from the Intake Worklist. You can use one or several of the quick filter suggestions or you can easily create your own.

1. Make sure you are on the Intake Worklist. For more information on navigating to the Intake Worklist, see Navigating.
2. Depending on what you would like to filter for, choose one or several of the existing quick filter suggestions, available below the search bar.

   Alternatively, create a filter of your own by selecting the **More Filters** and choosing one of the options from the list.

   Your active filters will appear in the search bar at the top of the page.

   You may also select a set of filters you have previously applied from the history list. These are marked appropriately with the history icon . The filter history appears once you select search bar. Up to ten instances of previously used filters are stored.

   > **Note**
   >
   > The filters you apply are saved until you remove them.

3. In the search bar, select the filter you would like to configure, then select or enter the required value to refine your filter.

   Blue text indicates the value a filter is actively changing your results for.

The Intake Worklist will automatically refresh. If you would like to refresh the list of records manually, see Refresh the Intake Worklist.

> **Note**
>
> If none of your records match the filters you have applied, the Intake Worklist will ask you to either **Refresh Data** or **Clear Filters**.

Refresh the Intake Worklist

The Intake Worklist refreshes automatically after most of the significant actions you take. Nonetheless, you have the option of refreshing the Intake Worklist manually.

The following actions trigger an automatic refresh for the Intake Worklist:

- When you navigate from a different page to the Intake Worklist
- As you sort your records

- After you modify your filters
- Once you switch views

To refresh the Intake Worklist manually, follow the steps below.

1. Make sure you are on the Intake Worklist. For more information on navigating to the Intake Worklist, see Navigating.
2. Depending on your role, perform one of the following: .
   - As a workflow manager, select **Refresh** from the top right corner of the page.
   - As an intake processor, select **Actions**, then **Refresh**.

7

Working with your records

Learn more about working with your records in the topics below.

- Possible tasks related to processing your records
  Once you have uploaded your AE documents to Oracle Safety One Intake or the AE documents have been automatically ingested, you may need to take further action before they are processed.
- Validating a record
  Once your documents have finished uploading, they may be associated with the Check Validity task. As part of this task, you not only have to validate and group the documents, but also designate a document as primary.
- Organizing documents in a record
  As an intake processor, you can flexibly organize the AE documents contained in a record. This is to appropriately group documents whenever a record includes multiple cases, copy relevant documents between cases, or mark documents as primary.
- Working with the data in your documents
  Learn more about working with the AE document data in the topics listed below.
- Finding duplicates and merging follow-ups
  Learn more about working with your records in the topics below.

Possible tasks related to processing your records

Once you have uploaded your AE documents to Oracle Safety One Intake or the AE documents have been automatically ingested, you may need to take further action before they are processed.

Table 7-1 Possible tasks related to processing your records

Task	Possible reasons
Check Validity	• Multiple documents are uploaded manually at once. For guidance on grouping case documents, see Group your documents. • The API or email source which is sending documents over to Oracle Safety One Intake is configured to request manual triage. For more information on marking a record as valid, see Validating a record. • The uploaded document is password protected or the email is confidential. In this scenario, you may have to reject the record and reupload it as part of a new record. For more information on rejecting a report, see Reject a record. • One or several documents that have been uploaded have been marked as malicious. In this scenario, you may have to reject the record and reupload it as part of a new record. For more information on rejecting a report, see Reject a record. • The size of the incoming email exceeds the configured maximum limit. Your administrator is responsible for setting the maximum size for manually uploaded documents. Contact your administrator directly for more information on changing the maximum upload size. • The incoming document is not of a supported type. You can reject the record and reupload it as part of a new record. For more information on rejecting a report, see Reject a record. For more information on configuring file types and sizes for incoming email and documents, see Understanding which documents to add.
Review Record	• The OCR/ML-extracted data has been marked as Low Confidence. For more information on working with low confidence data, see Work with Low Confidence data. • Essential details are missing. In this scenario, you can manually add missing data to a record. For more information, see Add missing data. • Various validation issues.
Manual Intake	• Whenever the document is unidentified, you can add data to a new record manually. For more information, see Manually add data to a new record.
Duplicate Search	• Whenever the system is unable to locate a matching case for a document, indicating it may be the initial document of a new case, this task is associated with said document. Users can then manually designate it as a follow-up. For more information, see Process Duplicate Search records.

Table 7-1 (Cont.) Possible tasks related to processing your records

Task	Possible reasons
Merge Follow-up	• A record is associated with this task whenever it contains documents that are follow-ups to an existing case record. • Only applies to E2B records.

Validating a record

Once your documents have finished uploading, they may be associated with the Check Validity task. As part of this task, you not only have to validate and group the documents, but also designate a document as primary.

For more information on the possible reasons behind the Check Validity task, see Possible tasks related to processing your records.

1. Make sure you are on the Intake Worklist or the Intake Monitor. For more information on navigating to these pages, see Navigating.
2. Select the record you would like to validate by clicking on its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

> **Note**
>
> If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. In the panel on the left, switch between AE documents as required.
4. Work with the data as required. For more information on working with the data in your documents, see Working with the data in your documents.

> **Note**
>
> If your record has multiple documents which require your intervention, you can navigate between them in the panel on the left.

5. Select one of the following, in the upper right corner:
   - **Submit Report**, to validate the document.
   - **Reject Report**, for which you must select a justification or provide a custom justification by choosing **Other**.

Organizing documents in a record

As an intake processor, you can flexibly organize the AE documents contained in a record. This is to appropriately group documents whenever a record includes multiple cases, copy relevant documents between cases, or mark documents as primary.

Depending on your work, you can perform the following actions:

- Mark a document as primary
  Whenever multiple AE documents are associated with the same case, as an intake processor, you are required to designate a primary document for automatic extraction.
- Group your documents
  Whenever multiple AE documents correspond to multiple, separate cases, as an intake processor you are required to group the documents such that one group is connected to a single case.
- Add or remove a copy of a document to or from a group
  As an intake processor, you can create copies of AE documents, which are automatically added to groups within your record. You can also copy documents from groups.
- Separate your documents into groups
  As an intake processor, you can split all the documents contained within a record into individual groups, for potential cases.
- Mark a document as invalid
  As an intake processor, once you have checked a document in a record, you can mark it as invalid. Based on the contents of the document, you can select a reason for marking it as invalid.

Mark a document as primary

Whenever multiple AE documents are associated with the same case, as an intake processor, you are required to designate a primary document for automatic extraction.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. Check the box of the record you would like to work on, select **Expand Details**, then select **Start Work**. You can also click the hyperlink record ID.

   > **Note**
   >
   > If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. In the panel on the left, switch between AE documents as required.
4. Above the panel, select **Mark Primary** to mark a document as primary. Repeat this action for each group from your record.

   You can identify primary records based on Primary .

   > **Warning**
   >
   > You can only undo marking a document as primary by discarding the changes you have made to the entire record.

5. Once you have finished working on your record, select **Confirm**.

Group your documents

Whenever multiple AE documents correspond to multiple, separate cases, as an intake processor you are required to group the documents such that one group is connected to a single case.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. Select the record you would like to validate by clicking on its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

   > **Note**
   >
   > If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. In the panel on the left, switch between AE documents as required.
4. Select **Add group** at the top.
5. Select **Move to Group**, then choose the group you would like to move your document to.

   > **Tip**
   >
   > You can also drag and drop your document to the appropriate group.

6. Once you have finished working on your documents, select **Confirm**.

Add or remove a copy of a document to or from a group

As an intake processor, you can create copies of AE documents, which are automatically added to groups within your record. You can also copy documents from groups.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. Select the record you would like to validate by clicking on its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

   > **Note**
   >
   > If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. In the panel on the right, switch between AE documents as required.
4. Depending on your requirements, perform one of the following:
   - Select **Copy**, then choose the group you would like the document copied to. If the record you are working on has one group, you will be prompted to create a new group.
   - Select **Options** ..., then **Remove Copy**.

Separate your documents into groups

As an intake processor, you can split all the documents contained within a record into individual groups, for potential cases.

> **Warning**
>
> Using this feature will split any existing groups. To undo this action, you may have to discard all actions you have performed on a record.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. Select the record you would like to validate by clicking on its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

   > **Note**
   >
   > If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. At the top of the document viewer, select **Options** ..., then **Separate**.
4. Select **Separate** from the pop-up window.

Mark a document as invalid

As an intake processor, once you have checked a document in a record, you can mark it as invalid. Based on the contents of the document, you can select a reason for marking it as invalid.

Table 7-2 Reasons for invalidating a document

Reason	Description
No Company Product	The document makes no reference to a relevant pharmaceutical product.
Non-AE Document	The document falls outside the scope of AE documentation.
Other	Type your own reason for marking the document as invalid.

> **Note**
>
> Administrators can make changes to the list of invalidation reasons. For more information, reach out to your administrator.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.

2. Select the record you would like to validate by clicking on its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

> **Note**
>
> If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. In the panel on the left, switch between AE documents as required.
4. At the top of the document viewer, select **Mark Invalid**.
5. Select the reason for marking the document as invalid.

   If you have selected **Other**, type the reason for your choice and select **Mark Invalid**.

> **Note**
>
> To undo marking a document as invalid, simply return to the Intake Worklist using **Go Back to Worklist** above the list of AE documents.

Working with the data in your documents

Learn more about working with the AE document data in the topics listed below.

- Get familiar with the Intake Form
  Selecting a record from the Intake Worklist often opens the Intake Form, where you can add or modify data before sending the record for case processing.
- Work with Low Confidence data
  As an intake processor, you can work with Low Confidence data for records associated with the Review Record task. Only data extracted using OCR/ML can be marked as Low Confidence. AI/ML extraction requires an additional subscription to Oracle Safety One Intake. For more information, reach out to your Oracle point of contact.
- Add missing data
  Once the system has finished extracting textual data from a document, it automatically categorizes it and populates the appropriate fields in the Intake Form. You can use the **Quality Check** pane to identify fields with missing, incomplete, or invalid data. AI/ML extraction requires an additional subscription to Oracle Safety One Intake.
- Use the document pane to review sources and extractions
  When one or more documents are present for an intake record, you can use the **Case files** drop-down to browse the attachments, emails, or other source documents. If you are subscribed to Oracle Safety One Intake, you can use the **Extraction Viewer** to review the automatically extracted the data from the sources
- Use the Extraction Viewer to review extracted data
  If you have a subscription to Oracle Safety One Intake, you can use the **Extraction Viewer** to review the data extracted from the unstructured source files (like email) in an intake record.
- Reject a record
  As an intake processor, you can reject an entire record based on one of several criteria.

Get familiar with the Intake Form

Selecting a record from the Intake Worklist often opens the Intake Form, where you can add or modify data before sending the record for case processing.

The validation criteria reflect the format of data the respective fields accept. The system automatically marks any data that cannot be validated with a status of *Needs review*.

You can find more information about individual fields available in the Intake Form in the eTRM documention provided to your organization. You can also review the Enter case data chapters in the *Argus Safety User's Guide* to read more how each of the fields function and what kinds of data can be accepted into the individual fields.

PII and Blinded data in the Intake Form

PII (Personally Identifiable Information) and blinded data are displayed according to your administrator's configuration of your user role and group:

- If your user account is not configured to view PII, the field displays the value as “[PII Restricted]”.
- If your user account has the setting "Protect from Unblinded Information" enabled, blinded fields show as "[Blinded]" on the Intake Form.

Multi-lingual & null flavors

Fields that have additional translation capabilities have a multi-lingual icon . Clicking the icon opens a dialog where you can select a different language and perform the translation on the field. You can enable or disable the translation feature from the **Actions** menu.

If configured, some fields may also have a **Null Flavors** NF icon. Clicking **Null Flavors** populates the field with drop-down values, where you can select the appropriate null flavor.

Work with Low Confidence data

As an intake processor, you can work with Low Confidence data for records associated with the Review Record task. Only data extracted using OCR/ML can be marked as Low Confidence. AI/ML extraction requires an additional subscription to Oracle Safety One Intake. For more information, reach out to your Oracle point of contact.

> **Caution**
>
> AI-powered automatic extraction from source documents is for evaluation purposes only. Please review the output thoroughly before use.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. Select the record you would like to validate by clicking its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

> **Note**
>
> If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. If there is Low Confidence data, it is marked for your attention in the **Quality Check** panel by the **Information** icon.
4. You can also review the extractions in the **Extraction Viewer**, accessible via the drop down menu in the document pane.
5. Reject or accept the information contained within the field.
   - To accept the data, select **Verify** in the **Quality Check** panel.
   - To reject the data, edit the field in the Intake Form. This will remove the Low Confidence item from the **Quality Check** panel.
6. Once you have verified the necessary data, select one of the following:
   - **Save**, to save your work and continue later.
   - **Duplicate Search**, to open the Duplicate Search interface. From here, you can either choose to merge this case with an existing record or case or create a new case for further processing. For more information, see Possible tasks related to processing your records.

Add missing data

Once the system has finished extracting textual data from a document, it automatically categorizes it and populates the appropriate fields in the Intake Form. You can use the **Quality Check** pane to identify fields with missing, incomplete, or invalid data. AI/ML extraction requires an additional subscription to Oracle Safety One Intake.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. Select the record you would like to validate by clicking on its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

> **Note**
>
> If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. Once you are on the Intake Form for the record, refer to the **Quality Check** panel to view a list of the fields that need your attention.
4. Do one of the following:
   - Click one of the items in the **Quality Check** or **Case** panel to navigate to the selected field in the Intake Form. Add or modify the values in the field.
   - Select **Save** to retain any edits or additions you have made to the Intake Form. If you have resolved an error that previously appeared in **Quality Check**, clicking **Save** will remove it from the **Quality Check** panel.
   - Select **Validate** to re-run all of the system field validations.

- Select **Duplicate Search** to find any existing records with which you may merge the incoming record.
- Select **Manage Attachments** from the **Actions** menu to navigate to the Attachments section of the Intake Form.
- Select **Disable Additional Language Data** from the **Actions** menu to remove the translation service function from the Intake Form (if configured).
- Select **Reject Record** from the **Actions** menu to reject the record and add a justification.
- Click **Cancel** from the **Actions** menu to abandon the session and return to the Intake Worklist.

Use the document pane to review sources and extractions

When one or more documents are present for an intake record, you can use the **Case files** drop-down to browse the attachments, emails, or other source documents. If you are subscribed to Oracle Safety One Intake, you can use the **Extraction Viewer** to review the automatically extracted the data from the sources

1. Open a record from the Intake Worklist that has the task **Review Record**.
2. Once you are on the Intake Form, you can review any source documents using the document pane on the left panel of the screen.
3. Select a document to view from the **Case files** drop-down menu. It loads inside the document pane. You can detach the document pane for expanded viewing by clicking the **Open file in new window** icon.

   > **Note**
   >
   > Closing the detached document pane sends the opened document back to the inline document pane view.

4. Click **Manage Attachments...** from the **Case files** drop-down menu to open the Attachments section of Intake Form.
5. If you have a subscription to Oracle Safety One Intake, you can also use the **Extraction Viewer** to see details about the information automatically extracted from the source documents. For more information, see Use the Extraction Viewer to review extracted data.

Use the Extraction Viewer to review extracted data

If you have a subscription to Oracle Safety One Intake, you can use the **Extraction Viewer** to review the data extracted from the unstructured source files (like email) in an intake record.

Oracle Safety One Intake features an annotation tool that is displayed inside the **Extraction Viewer**, accessed from the **Case files** drop-down menu in the document pane. You can view the annotation tool inline or detach the document pane using the **Open file in new window** icon for an expanded view that includes confidence scores, extraction relationships, and full attribute context.

You can use the **Highlight All Extractions** toggle in the document pane to display a colored overlay over every data point extracted from the structured document, helping you quickly verify all information captured by the extraction engine within the original source.

Different extraction viewers may be available depending on the source file. For example, you may see **Extraction Viewer (Attachment)** in addition to **Extraction Viewer (Email)** available in the **Case files** drop-down menu.

> **Caution**
>
> AI-powered automatic extraction from source documents is for evaluation purposes only. Please review the output thoroughly before use.

1. Open a record from the Intake Worklist with the task **Review Record**.
2. On the left side of the Intake Form in the document pane, select **Extraction Viewer** from the **Case files** drop-down menu.

Reject a record

As an intake processor, you can reject an entire record based on one of several criteria.

The table below is only an example. The list of rejection reasons is completely configurable by administrators in the Justifications codelist in the **Argus Console**.

Table 7-3 Report rejection reasons

Reason	Description
No Company Product	The document makes no reference to a relevant pharmaceutical product.
Non-AE Document	The document falls outside the scope of AE documentation.
Other	Type your own reason for marking the document as invalid. You can write up to 255 characters, including spaces. Records that are rejected as part of the Duplicate Search task will have Other assigned as a reason for rejection. For more information, see #unique_62

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. Select the record you would like to validate by clicking on its ID. Alternatively, you can check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.

   > **Note**
   >
   > If you are trying to work on a record which is not assigned to you, you will be prompted to continue with or without assigning that record to you.

3. Once you have checked the documents contained within the record, select **Reject Record** from the **Actions** drop down menu.
4. Select a reason for marking the document as invalid.

For more information on rejection options, see Mark a document as invalid. The pre-defined justifications can be modified by administrators so your list of reasons may have other options.

5. If you have selected **Other**, type the reason for your choice and select **Add Justification**.

> **Warning**
>
> This action cannot be undone.

Finding duplicates and merging follow-ups

Learn more about working with your records in the topics below.

- Work with Duplicate Search records
  Once Oracle Safety One Argus has associated the Duplicate Search task with a record, as an intake processor, you need to manually handle that record and determine whether it is an initial case or a follow-up.
- Work with Merge Follow-up records
  As an intake processor, you can verify the records associated with the Merge Follow-up task, then merge them with existing cases or intake records. When the system automatically matches an incoming record with an existing case, the interface displays recommendations in the Merge Viewer on which data to merge.
- Accept or reject records in bulk
  As an intake processor, you can accept or reject multiple records at once, depending on their status.

Work with Duplicate Search records

Once Oracle Safety One Argus has associated the Duplicate Search task with a record, as an intake processor, you need to manually handle that record and determine whether it is an initial case or a follow-up.

Understand why a record has been flagged as Duplicate Search

The Duplicate Search task is associated with a record in one of the following scenarios:

- For files compliant with the E2B standard: the system has found no matches among the existing cases or intake records in your Consolidated Intake environment. Moreover, your administrator has not configured the agency to automatically accept cases as initial from the source of the new record.
- For PDF, DOC, and DOCX files: no extraction errors were detected so additional review is not required.
- Oracle Safety One Argus has accepted the incoming record as initial, but the system has encountered an error.

The duplicate search function is available for records associated with the following tasks:

- Review Record
- Manual Intake
- Duplicate Search
- Merge Follow-up

To handle a record associated with this task, you work in the Duplicate Search interface, which automatically populates with the data Safety One Argus has already extracted. To adjust the search criteria for duplicate resolution, you can add or remove the fields as necessary using the **Select Columns** feature.

You can use the **Optimize date search** toggle to apply receipt date range limits to the results. For more information on how searching on receipt range works, refer to Receipt range—fields descriptions in the *Oracle Argus Safety User's Guide*.

The search results include a matching score, where a higher score means a better match. Clicking the score number in the search results opens the Score Details drawer over the interface, displaying the comparison of the fields for the selected match to the incoming record and identifies the type of match that was made.

> **Note**
>
> If the **Score** column is not visible for your results, smart search may not be enabled. Contact your administrator for more information about the smart search feature. The Smart duplicate search topic in the *Oracle Argus Safety User's Guide* has more information.

Whenever you accept an incoming record as initial, Oracle Safety One Argus creates a new case. Conversely, whenever you accept an incoming record as follow-up, its data will be added to an existing case. Whenever you accept an incoming record as follow-up, you may also be prompted to hold the record. For more details, see Using the On Hold Worklist

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.

   > **Tip**
   >
   > You may also access records from the Intake Monitor. For a list of all available views and charts, see Monitor records as a workflow manager.

2. Select the ID of the record you would like to start working on.

   Alternatively, you may also tick the box of the record you wish to work on, select **Expand Details**, then **Start Work**.
3. In the Duplicate Search interface, enter any additional search criteria.
4. To view the Intake Form for the incoming record, select **Review Record** from the **Actions** menu. To view attachments for the incoming record, select **View Attachments**from the **Actions** menu.
5. Click **Search** to perform the duplicate search. Selecting **Search (With Like, Soundex)** performs a search that uses fuzzy matching to produce the results.
6. After performing a duplicate search, you can perform any of the following actions:
   - Conduct additional filtering using the search field above the results.
   - Modify the search criteria and search again. You can also use the **Reset Search Criteria** option from the **Actions** menu to clear the existing duplicate search fields and start over.
   - Select **Confirm Initial** to create a new case if no applicable duplicate records are found. A case number is displayed in a dialog box after successfully creating the new

case. If there aren't any additional validation errors, you are prompted to complete the **Accept Record Justification** dialog.

> **Note**
>
> Depending on your configuration, you may be prompted to re-authenticate before completing the **Accept Record Justification** dialog.

- If duplicates have been found, you can use **Merge Follow-up** to merge the incoming record with one you have selected from the search results. After selecting **Merge Follow-up** you are taken to the Merge Follow-up interface.
- Select **Reject Record** from the **Actions** menu. The system may prompt you to re-authenticate. Once you have done so, you will be prompted to add a justification.
- You can export the duplicate search results list in .csv format. Select **Export Results List** from the **Actions** menu to trigger the download in your browser.

Work with Merge Follow-up records

As an intake processor, you can verify the records associated with the Merge Follow-up task, then merge them with existing cases or intake records. When the system automatically matches an incoming record with an existing case, the interface displays recommendations in the Merge Viewer on which data to merge.

Opening a record that has the Merge Follow-up task from the Intake Worklist takes you to the Merge Viewer. The Merge Follow-up task is usually assigned to a record when a follow-up has already been linked to an existing case the incoming data needs to be reviewed before performing the merge.

You can also access the Merge Viewer from the Duplicate Search screen by selecting the **Merge Follow-up** action. For more information on Duplicate Search, see Work with Duplicate Search records.

Use the Merge Viewer

The Merge Viewer interface shows a version of the intake form where the values of the incoming, current, and previous record information are displayed to you inline so you can decide which pieces of data to keep or reject. **Previous** refers to the most recent intake record that was either processed into a new case or merged into the current case. Whenever a field contains an update from the incoming record, the system assesses the incoming intake record against the current and previous (if applicable) record or case and provides recommendations on which data to keep in the merge.

You can use the **Quality Check** panel in the navigation pane like a "to-do" list where you can click through and verify all of the fields that have system recommendations. Clicking an item in **Quality Check** automatically loads the relevant form section with the selected field in focus so you can verify the system recommendation or select a different data item to merge.

Resolving data in the Merge Viewer

Fields in the Merge Viewer are converted to drop-down menus when there are system recommendations available, allowing you to select which values (**Incoming**, **Current**, or **Previous**) to merge into the record.

> **Note**
>
> The logic that is used to determine the system-recommended values is configurable by your administrator.

Sections that present as tables in the Merge Viewer (such as Products and Events) have additional manual resolution actions you can perform on the items within the table. You can access these data resolution options by clicking the **Actions** ··· icon, either available at the row-level in the section table or along the top of the display after clicking into the individual item:

Table 7-4 Merge Viewer Products and Events actions

Action	Availability	Description
Match	Available for items with the status **Added**.	You can perform a match of two of the items in the section. If all underlying fields within the item match within the threshold, the status is updated to **Matched**. If some of the underlying fields cannot be matched, the item's status changes to **Updated**.
Separate	Available for items with the status **Updated**.	Performing the **Separate** action splits the item into two entities: • One from the current case (marked with the status **Retained**). • One from the incoming case (marked with the status **Added**).
Remove	Available for items with the statuses **Retained** and **Added**.	Performing this action marks the item as **Removed** in the table and excludes it from the merged case.
Retain	Available for items with the status **Removed**.	Perform this action to restore an item to **Retained** or **Added** status. The item is included in the merged case.

The section table for fields like Products and Events display the source of the data using shorthand in the **Record Source** column:

- **In**: The item is in the incoming record.
- **(Prev)**: The item is present in the previous intake record that was merged (applicable when merging records in succession).
- **Cur**: The item is present in the current case or intake record.

Large text fields (such as Narrative or Case Comments) have additional update statuses and data merge options:

- **Append Incoming at End**: The text from the existing or previous record is retained, the text from the incoming record is displayed after.
- **Append Incoming in Beginning**: The text from the incoming record is displayed above the text from the existing or previous record.

- **Replace Current**: The text from the incoming record replaces the text from the existing or previous record's text content for the field.
- **Retain Current**: The text from the existing record is retained.

Special data handling considerations

When a company study is present in either the incoming record or current/previous record or case, study values are displayed as read-only in the Merge Viewer - you are not able to overwrite the existing case or record data with incoming study value updates.

Incoming drug data for a company study are added as non-study drugs unless there is an exact match for a drug present in the current case or record.

Navigation and performing a follow-up merge:

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.

   > **Tip**
   >
   > You may also access records from the Intake Monitor. For a list of all available views and charts, see Monitor records as a workflow manager.

2. Check the box of the record you would like to work on, select **Expand Details**, then select **Start Work**. You can also select the ID of the record you wish to work on.
3. In the Merge Viewer interface, compare the data of the incoming record with that of the existing or previous case. Fields that contain updates from the incoming record are marked with a **Review Change** label in the Merge Viewer and are also added as items to the **Quality Check** panel.
4. Perform any of the following:
   - Use the **Verify** button in the **Quality Check** panel to accept the system recommendations. Alternately, you can click the name of the field in the **Quality Check** or **Case** panel to be taken directly to the updated field where you can manually enter or select the appropriate value.
   - Select the **Validate** button to re-run any system validations in the form.
   - Click **Merge** to combine the incoming record with the current case or record. You are prompted to complete the **Follow-Up Justification** dialog to continue the merge with a justification.
   - Reject the record by selecting **Reject Record** from the **Actions** menu.
   - Select **Duplicate Search** from the **Actions** menu to return to the Duplicate Search screen to find other records or cases to merge.
   - You can select **Reset to System Recommendation** to clear any manual updates you have made in the Merge Viewer.
   - Use the **Cancel** option from the **Actions** menu to return to the Intake Worklist.

After the merge, the incoming follow-up record is joined with the current existing case or record. A new follow-up/amendment row is added to the **Merge Difference** report attached to the case.

Accept or reject records in bulk

As an intake processor, you can accept or reject multiple records at once, depending on their status.

Before you work with this feature, you should be aware of the following:

- Only records with the following tasks associated can be accepted in bulk:
  - Duplicate Search
  - Merge Follow-up
- Records cam be rejected in bulk regardless of the tasks they have associated.
- As you use this feature, you may encounter one of the following errors:

Error	Applies to action	Description
Record in use	Accept, Reject	A different user is handling the record.
User not permitted	Accept, Reject	You do not have permission to access the record.
Acceptance not allowed for this task	Accept	One or several records do not have the Duplicate Search or Merge Follow-up tasks associated.
Intake complete	Accept/Reject	One or several records have already been accepted or rejected.
Case not ready	Accept	The target case does not accept a follow-up.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.

   Tip

   You may also access records from the Intake Monitor. For a list of all available views and charts, see Monitor records as a workflow manager.

2. Check the boxes of the records you would like to work on.
3. Select **Actions**, then select one of the following:
   - Accept
   - Reject

   After clicking **Accept** a confirmation of the records queued for acceptance and not queued for acceptance is displayed. "Not queued for acceptance" applies to records that meet the condition described in error table above. They remain in Intake Worklist.

   The records queued for acceptance are cleared from the Intake Worklist if no validation errors are detected. If validation fails or mandatory information is missing, the records re-appear in the Intake Worklist.

   You can view the more information on the acceptance failure by clicking the **Error** button from the Workflow Management panel (accessible by clicking the **Expand Details** button on the Intake Worklist after selecting a record).

8 Using the On Hold Worklist

The On Hold Worklist enables workflow managers and intake processors to review records that have been put on hold.

Overview

Whenever the Consolidated Intake system is unable to add a follow-up record to a case, the record is put on hold and is accessible through the On Hold Worklist.

Follow-up records can be put on hold for the following reasons:

Table 8-1 Reasons for records to be put on hold

Reason	Description
Case in workflow state not accepting follow-up merge	The current workflow state of the case is configured to not accept Follow-up Merge. For more information, see Configure hold follow-up merge in the *Consolidated Intake Administration Guide*.
Case is locked	The case is locked and cannot currently accept follow-up documents. For more information on lock or unlocking cases, see Lock or unlock a case in *Oracle Argus Safety User's Guide*.
Case is in use	The case or intake record is currently open and a different user is working on it. The system may also still be working on the case.

Records can be put on hold manually or automatically:

- Whenever a user accepts a follow-up record, but the destination case or intake record cannot accept a follow-up record due to the reasons outlined above, Consolidated Intake prompts the user to either put the record on hold or discard it altogether.
- If Auto-Accept is enabled and the destination case cannot accept a follow-up record due to the reasons outlined above, the E2B record is automatically put on hold.

> **Note**
>
> Your administrator is responsible for configuring the Auto-Accept feature on a source by source basis.

Once the reason is lifted, the record is returned to the normal Consolidated Intake flow.

- Work with records that are on hold
  As an intake processor or a workflow manager, using the On Hold Worklist, you can find out in more detail why a record has been put on hold.

Work with records that are on hold

As an intake processor or a workflow manager, using the On Hold Worklist, you can find out in more detail why a record has been put on hold.

For more information on the reasons why a record can be put on hold, see Using the On Hold Worklist.

1. Make sure you are on the On Hold Worklist. For more info on navigating to the On Hold Worklist, see Navigating.
2. Filter and customize the layout of the On Hold Worklist to best suit your needs. For more information, see Fine-tune your worklist with advanced filters, as well as Optimize the data being displayed using columns.

> **Tip**
>
> You can select **Actions**, then **Clear Filters** to remove the filters you have applied.

3. Check the box of the record you would like to work on, select **Expand Details**, then **Start Work**.
4. The informational message above the Merge Follow-up form displays the reason that the record was put on hold. You can view all of the incoming details against its initial case or intake record in a read-only version of the Merge Viewer.
5. Perform one of the following:
   - Select **Reject Record** to reject the intake record. The record is cleared from the On Hold Worklist.
   - Select **Cancel** and the record will remain unchanged while you are taken back to the Intake Worklist.
6. Optionally, you can export all of the records in the On Hold Worklist. To do so, select **Actions**, then **Export**.

9

Monitoring your records

The Intake Monitor is a central list in the Consolidated Intake system which displays all the records which have been uploaded, regardless of the requirement for manual intervention.

The purpose of the Intake Monitor is to provide an overview of the duration of conversion processes, in as much detail as necessary for your work.

Understanding record states in the Intake Monitor

In the Intake Monitor, records can have the following statuses:

- *Intake Processing*: records with this status are being processed by the system.
- *Processed*: records with this status have been processed by the system. These can also have the following sub-statuses:
  - *Processed-Invalid*
  - *Processed-Initial*
  - *Processed-Follow up*
- *On Hold*: records with this status have been automatically detected as follow-ups to existing records.

The Intake Monitor also provides insight into processing time, which presents the total time the Consolidated Intake system took to process a record. Using this feature, you can get a feel for how long it typically takes to process a particular type of record.

- Monitor records as a workflow manager
  As a workflow manager, you can see the distribution of intake records based on a variety of metrics and charts.
- Monitor records as an intake processor
  As an intake processor, you can use the Intake Monitor to keep track of the records you have access to, all in one place. This includes records undergoing intake processing, records that have been put on hold, and records that have already been processed.

Monitor records as a workflow manager

As a workflow manager, you can see the distribution of intake records based on a variety of metrics and charts.

Available metrics

- Intake processing > 24hrs
- All Received
- In Progress
- Processed

These metrics can be accessed via separate tabs in the Intake Monitor. Each of the tabs has charts with sections. You can check the record count for every section of the chart by hovering your mouse over it. You can also access further details about the data by right clicking on each section of each chart.

Charts to explore for records older than 24 hours

These charts provide an overview of all records which have taken more than 24 hours to process, thus exceeding the compliance period. These charts do not include records with a state of On Hold.

> **Note**
>
> The color scheme of the charts reflects the median processing time for the records from each section. The charts' colors range from orange, indicating processing times closer to 24 hours, to deep red, which indicates processing times closer to 50 hours and beyond.

Table 9-1 Charts to explore for records older than 24 hours

Chart title	Chart sections	What you see	What you can do
Intake Processing > 24h by Task	• Check Validity • Review Record • Create New Record • Duplicate Search • Merge Follow-up • System Processing	This chart shows records that have exceeded the 24-hour compliance period, considering both manual and automatic tasks. The System Processing section includes all the background activities the Consolidated Intake system performs, such as classification, data extraction, or case acceptance.	To get the number of records for each manual task, hover your mouse over each section of the chart.
Intake Processing > 24h by Site	One section for each site, as well as: • Other • No Value Present • All sites	This chart displays records that have exceeded the 24-hour compliance period, organized by site. The No Value Present section reflects the number of records that have no site and are currently in intake processing, and have breached the 24-hour compliance period. If a section for a site contains fewer than three percent of the total number of records (across all sites), these records will be added to the Other section.	To get the number of records for each manual task, hover your mouse over each section of the chart.

Table 9-1 (Cont.) Charts to explore for records older than 24 hours

Chart title	Chart sections	What you see	What you can do
Intake Processing > 24h by Type	One section for each type, as well as: • Unidentified • No Value Present • Other • All Types	This chart categorizes records that have exceeded the 24-hour compliance period, organized by type. For more information on the types of documents which can be uploaded to Consolidated Intake, see Understanding which documents to add. Records the types of which have not been identified are grouped under the Unidentified section of the chart. Records which have not yet been classified by the Consolidated Intake system will be grouped under the No Value Present section of the chart. If the number of records under either of these sections is below three percent of the total number of records, then these records are grouped under the Other section.	To get the number of records for each manual task, hover your mouse over each section of the chart.
Intake Processing > 24h by Assignment	• Other • One section for each assignee • Unassigned	This chart categorizes records that have exceeded the 24-hour compliance period, organized by assignment. If the number of records under either of these sections is below three percent of the total number of records, then these records are grouped under the Other section.	To get the number of records for each manual task, hover your mouse over each section of the chart.
Records in Queue with Greatest Processing Time	N/A	This chart lists records that have exceeded the 24-hour compliance period and have the longest processing times.	For more details, click on each record's hyperlink.

Charts to explore for all records

You can gain insight into the number of records ingested by the Consolidated Intake system in the last 30 days using the All Received metric. Within All Received, the following categories are available:

> **Note**
>
> The color scheme of the charts reflects the median processing time for the records from each section. The charts' colors range from orange, indicating processing times closer to 24 hours, to deep red, which indicates processing times closer to 50 hours and beyond.

Table 9-2 Charts to explore for all records

Chart title	Chart section	What you see	What you can do
All Received by State	• In progress • Processed • On Hold	All records received in the last 30 days, grouped by their current state.	To see the number of records in each state, hover your mouse over each section.
All Received by Day	• In progress • Processed • On Hold	Records received in the last 30 days, grouped by the day they were received. The section pertaining to each day is further split between categories for the current states of its respective records.	To track records received on specific days and their processing status, hover your mouse over their respective section.
All Received by Site	• One section for each Site • Other • No Value Present • All Sites	All records received in the last 30 days, categorized by their current site. The No Value Present column reflects the number of records received within the last 30 days, that have no site associated. If the number of records under either of these sections is below three percent of the total number of records, then these records are grouped under the Other section.	To understand the distribution of records across different sites and their processing status in percentages, hover your mouse over each section.

Table 9-2 (Cont.) Charts to explore for all records

Chart title	Chart section	What you see	What you can do
All Received by Source	• One section for each Source • Other • No Value Present • All Sources	All records received in the last 30 days, sorted by their current source. If the number of records under either of these sections is below three percent of the total number of records, then these records are grouped under the Other section.	To understand the distribution of records across different sites and their processing status in percentages, hover your mouse over each section.

Charts to explore for In Progress

Table 9-3 Charts to explore for In Progress

Chart title	Chart section	What you see	What you can do
In Progress by Task	• Grouped under Manual Intervention: – Check validity – Review Record – Create New Record • Grouped under System: – System Processing	All records currently in progress, grouped based on their status and necessity for intervention. The System Processing section includes all the background activities the Consolidated Intake system performs, such as classification, data extraction, or case acceptance.	Right click on each section of the chart to be able to Filter, List the records included in that portion of the chart, or Export Data.
In Progress by Assignment	• Unassigned • Group • Assignee • Other	All records currently in progress, grouped based on the user group they are assigned to.	Right click on each section of the chart to be able to Filter, List the records included in that portion of the chart, or Export Data. You can also hover your mouse over each section of the chart to show the total number of records it contains, as well as the records' median processing time.

Charts to explore for Processed

Table 9-4 Charts to explore Processed

Chart title	Chart sections	What you see	What you can do
Processed Record Compliance	• Compliant • Not Compliant	Shows processed records from the last 30 days, categorized according to their SLA compliance.	Right click on each section of the chart to be able to Filter, List the records included in that portion of the chart, or Export Data. You can also hover your mouse over each section of the chart to show the total number of non-compliant versus processed records.
Processed Record States	• All Processed • Valid • Initial • Invalid • Invalid reason • Follow-up • Sent • Other	A breakdown of all the records which have been processed, grouped based on their statuses. Records with a status of Sent can only exist if Consolidated Intake is configured for intake only. Records can only be assigned a status of Invalid whenever files in the E2B(R3) format encounter errors upon ingestion. This can also happen whenever validation errors occur during the processing of a record, such as length violations.	Right click on each section of the chart to be able to Filter, List the records included in that portion of the chart, or Export Data. You can also hover your mouse over each section of the chart to display the total number of records it is referencing, as well as their median processing time.
Case Acceptance Notification (ACK) Status	• Sent • Not Sent • Not Applicable • All Valid	Provides an overview of the case acceptance notifications (ACK) automatically sent out by the system.	Right click on each section of the chart to be able to Filter, List the records included in that portion of the chart, or Export Data. You can also hover your mouse over each section of the chart to display the total number of records it is referencing.

- Access the view modes of the Intake Monitor
  Depending on your role, you can access a range of metrics in the Intake Monitor. To learn how to navigate to these metrics, follow the steps below.

Access the view modes of the Intake Monitor

Depending on your role, you can access a range of metrics in the Intake Monitor. To learn how to navigate to these metrics, follow the steps below.

1. Make sure you are on the Intake Worklist. For more info on navigating to the Intake Worklist, see Navigating.
2. At the top of the page, select one of the following tabs:
   - Intake Processing > 24hrs
   - All Received
   - In Progress
   - Processed

   For a detailed description on each of these views, see Monitor records as a workflow manager.

Monitor records as an intake processor

As an intake processor, you can use the Intake Monitor to keep track of the records you have access to, all in one place. This includes records undergoing intake processing, records that have been put on hold, and records that have already been processed.

As an intake processor you can view records with the following states:

- Intake Processing
- On Hold
- Processed
- Accepted
- Invalid

The Intake Monitor enables you to perform the following actions:

- Sort your list of records based on a number of columns, such as Type, State, Task, Country, and many more.
- Click on one the ID of a record to access the page connected to its associated task. For example, selecting the ID of a record with a status of Review Record redirects you to the Review Record page.
- Select **Expand details** to view a summary of the data contained within that record.
- Export your list of records in the CSV format by selecting **Export Data**. This exports all of the records you have access to.

10

Publish intake records to a sponsor-owned safety database for case processing

Consolidated Intake supports publishing documents to external systems, such as other Oracle Argus Safety environments or other sponsor-owned safety platforms. This feature is useful for organizations who are responsible for intake processing only and publish the results to their own customers for case management.

For information on how to configure the external publishing features, reach out to your delegated administrator.

If your environment is configured to publish to external systems, Consolidated Intake handles incoming documents as follows:

- To documents that are not compliant with the E2B(R3) format, such as DOC, DOCX, or PDF, Consolidated Intake will make all the necessary adjustments in order to ensure compatibility with receiving systems.

> **Note**
>
> If the system encounters any issues during the conversion of extracted data to the E2B(R3) format, a warning file is generated, which is then embedded into the newly created E2B(R3) file.

- To documents that are compliant with the E2B(R3) format, Consolidated Intake will only add information pertaining to narrative processing, such as product or event tags identified through OCR/ML extraction.

> **Note**
>
> OCR/ML extraction is only available with an additional subscription to Oracle Safety One Intake.

The Consolidated Intake has the capability to transmit documents that require further case processing to other platforms using the following channels:

- Via email, only if the receiving system is configured appropriately. This applies to any non-Oracle Argus Safety application, as well as Oracle Argus Safety (both on-premise and cloud) applications that are older than version 8.4.1.
- Via REST API, should the recipient be an Oracle Argus Safety environment (both on-premise and cloud), version 8.4.1 or newer.

> **Note**
>
> To import E2B(R3) files received from Oracle Safety One Argus, you need to extend the existing E2B(R3) profile.

Whenever Consolidated Intake is configured to publish intake records to a sponsor-owned safety database for case processing, the system only performs tasks related to intake processing. Once intake processing has taken place, case processing is not performed within the system. This means that within the Create New Record and Review Record tasks, **Submit** is available instead of **Search**, allowing the record to be published to an external system once intake processing is complete. For more information, see Possible tasks related to processing your records.

In the event that errors occur during the transmission of records to other systems, such as a temporary outage of a recipient's email service, Consolidated Intake automatically assigns the Review Record task to the record. This enables users to re-submit records for transmission. For more information, see Possible tasks related to processing your records.

11 Access and export audit logs for Intake Records

You can access and export audit logs for Intake Records in the Oracle Safety One Argus interface

You must navigate to the Oracle Safety One Argus interface to access audit log information from the **Utilities** menu.

1. Navigate to the Oracle Safety One Argus interface.
2. Hover over the **Utilities** menu.
3. Hover over **Logs** and select **View Audit Log** from the context menu.
4. Select **Intake Records** from the **Category** drop-down menu. Provide additional parameters such as **Date** or **User**.
5. Click **Print List** to export your audit log results as a .pdf.

12

Appendix

- System errors
  As you work in Consolidated Intake, you may sometimes encounter system errors. To find out how to fix some of the most common errors, see the list below.
- User role attributes
  Use this topic to gain an overview of your role's attributes.

System errors

As you work in Consolidated Intake, you may sometimes encounter system errors. To find out how to fix some of the most common errors, see the list below.

Table 12-1 System errors

Error message	What you should do
System Error Something went wrong. We have been notified of the issue and will fix it shortly. If this issue persists, contact your administrator.	You should re-attempt your action. If the error persists, make a note of the actions which have led to the error. Then contact your system administrator, providing this information.
System Error The uploaded document(s): <file name>, <file name> do not meet the required format due to syntax errors or invalid parameters. Please address these issues and upload the documents again. If this issue persists, contact your administrator.	You should review the file, check and fix its extension, then try again. If the error persists, make a note of the actions which have led to the error. Then contact your system administrator, providing this information.
Network Error The server could not be reached. Please check your connection and try again. If this issue persists, contact your administrator.	Verify your connection and make sure you are connected to the internet. Alternatively, check if any applications, such as a Virtual Private Network (VPN), have stopped working as expected. You can then re-attempt your action.
Email not imported; size limit exceeded.	You can discard the email. You can also request for the email size limit to be adjusted by contacting your administrator. For more information about email size limits and automatic email ingestion more broadly, see Modify general email settings
Document(s) not imported; size limit exceeded: <document name>.	You can discard the email. You can also request for the incoming attachment size limit to be adjusted by contacting your administrator.
Document(s) not imported; security scan failed: <document name>.	Your document has been marked as malicious. You can discard the email.
Document(s) not imported; type not supported: <document name>.	Your document is not currently supported. You can discard the email.

User role attributes

Use this topic to gain an overview of your role's attributes.

Table 12-2 User roles

User Role	Role Description
CDA (Customer Delegated admin) or Global Administrator	Responsible for the management of user access in Safety One Argus.
Intake Processor	Reviews, edits, and processes records that are unassigned, assigned to themselves, or assigned to the user group they are part of.
Workflow Manager	Ensures incoming records are assigned to the correct processing users or groups. Monitors the system queue and ensures records are efficiently assigned, to prevent delays.
System Administrator	An administrative role responsible for the configuration required for AE processing, in Oracle Argus Safety console. Users with this role are also responsible for configuring and maintaining the Consolidated Intake email intake feature.